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ABSTRACT

This review develops a more systematic understanding of the contemporary significance of learning in Europe by considering the complex connections between the processes of economic restructuring, lifelong learning and partnerships. A brief introduction describes the contested terrain surrounding concepts such as lifelong learning, human capital, globalization and employability and the wide-ranging scope of the material reviewed. Chapter one discusses the nature and consequences of restructuring and covers economic restructuring and globalization, conceptualizing change, Fordism (the simultaneous growth of productivity and consumption), Post-Fordism, and specific issues relating to Europe. Chapter two covers lifelong learning in Europe, including terminology and meaning, the learning society and learning organizations, and national and European dimensions of lifelong learning. It also asks whether learning is individual or social. Chapter three discusses partnership and whether it is a process for change, including issues relating to social partnership, the European Union and Monetary Union and partnership at the workplace. Chapter four synthesizes the topics of restructuring, partnership, and learning, and covers restructuring and human resources management, and employability and partnership. The document contains an extensive bibliography. (SLR)

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Restructuring, Partnership and the Learning Agenda.

A Review

Restructuring, Partnership and the Learning Agenda: A Review

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March 2002

LEEDS UNIVERSITY
BUSINESS SCHOOL

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Introduction

The contemporary significance of learning, we are led to believe, is unquestionable. In an increasingly global world, characterised by economic uncertainty, learning - or more typically lifelong learning - is often presented as a survival tool for individuals, companies and economies alike. This is certainly the case at the level of policy formation, where learning is articulated as a powerful response to industrial restructuring and social exclusion. Thus, support mechanisms and initiatives need to be put in place to ensure that workers displaced by processes of capital restructuring are equipped with an adequate and marketable stock of skills. This agenda of 'employability' is, however, complex and costly and is best furthered, so the argument runs, through partnerships, such as those between employers and trades unions and between educational institutions, industry and the state.

It is uncontroversial to note that this line of reasoning represents something of a consensus, but as Coffield (1999:1: *emphasis in original*) argues, this 'consensus is *not* a straw man' because 'it constitutes a central plank in the policy of many western governments in the field of education, training and employment'. Yet, as he notes, the central tenets of the consensus - such as the human capital imperatives of globalisation and competitiveness and the emphases on employers' needs and individual responsibility – are not unproblematic. Certainly, the presumed linkages between patterns of economic restructuring and skill formation are far from clear-cut. The policy consensus is also plagued with problems of definitional ambiguity around the often taken for granted 'buzz words' of globalisation, lifelong learning, employability and partnership.

The development of a more systematic understanding of these issues and, in particular, the linkages between them, represents the key objective of this review. It is split into four sections. The first three sections consider the themes of economic restructuring, lifelong learning and partnership in turn. In reality, of course, the themes of enquiry are dynamically connected. The final section, therefore, reintroduces each theme and, in the form of a discussion, attempts to reconnect them

as an interrelated whole. The review is wide ranging and draws from literature covering the fields of education, economics, human resource management, industrial relations, international business, and vocational education and training. Given the sheer scale of the available literature and the fact that similar debates often take place in an 'isolated' way in different fields, the review is far from comprehensive. Instead, it aims to introduce and highlight the major lines of thought currently extant within the themes under investigation. Wherever possible multidisciplinary connections are made and the relevance for European policy debates drawn out. The review demonstrates the complex connections between the processes of economic restructuring, lifelong learning and partnership and the contested terrain within which they operate.

Chapter 1

The Nature and Consequences of Restructuring

Processes of restructuring, it seems, are a constant feature of contemporary capitalism. The line of argument is well rehearsed. Since the end of the post-war boom, economic restructuring has become central to attaining and maintaining competitive advantage in increasingly competitive and global markets. The consequences of this dynamic have, so the argument runs, been manifest at a variety of levels (Purcell, 1993; Jessop, 1994; Harvey, 1990; Lash and Urry, 1987). Politically, the tenets of neo-liberalism have achieved a seemingly hegemonic position, despite the recent obsession with the so-called 'third way' (Giddens, 1998, 2000). The emphasis of this political ideology on free-market competition and the removal of economic rigidities have had profound consequences for employment relations. Flexibility has been prioritised, at the expense of employment security and welfare. In the realm of industrial relations, collective bargaining has often been characterised as an undesirable feature of the modern economy. Trade unions have been destabilised by legislation and seen their established, nationally based institutional safeguards assailed. Additionally, social democratic political parties have sought to distance themselves from the notion and reality of trade unionism itself (Waddington 2000; Clark 1996). At the level of production, it is often argued that Fordist production methods have been transcended by post-Fordist approaches, although this position remains contentious. Nonetheless, it is relatively uncontroversial to argue that shortened product lifecycles, the rise of niche markets, ubiquitous technological innovation and an increasingly global market place have forced corporate and finance capital into a continuous state of restructuring and change. As the International Labour Organisation (1997) observes,

> [T]he achievement of sustained and lasting improvements in competitiveness [will] require not only change but a process of continuous change.

In extreme cases, this has resulted in full-scale plant closure or extensive labour retrenchment. Within the European Union (EU), developments in the global economy have been further refracted by the dimensions of European Monetary Union (EMU)

and measures aimed at the regulation of unemployment such as the European Employment Strategy (EES) entailing as it does the phenomena of employability and lifelong learning. Understanding the nature and consequences of restructuring is clearly, then, a complex undertaking, and something that has concerned researchers from a variety of academic disciplines. Yet there are still only a limited number of sophisticated multi-disciplinary analyses of economic restructuring processes, a problem that is compounded by the definitional ambiguity of many of the supposed characteristics of restructuring, such as globalisation, post-Fordism etc.

Economic Restructuring and Globalisation

In simple terms, restructuring typically refers to changes in the organisational structure of companies and industries and the technologies they use, whilst globalisation describes changes to the world economy manifested by increased levels of competition, technological development and mobility of international capital. For Ruigrok and van Tulder (1995), such processes are taking place in the context of the elevated incidence of acquisitions and strategic alliances. Nonetheless, they assert that, despite the extensive literature within this field, the concept of "restructuring" is poorly defined. For them, the concept itself came into common usage in the late 1970s, when it became apparent that the world-wide recession contained novel structural elements. As the American Federation of Labour noted:

> Every industrial nation is undergoing a scientific technological revolution every bit as significant as the industrial revolution of the nineteenth century (Kassalow 1989: 44)

Similarly, Robert Reich, the Labour secretary to the Clinton administration claimed that in the future:

> [T]here will be no national products or technologies no national corporations, no national industries. There will no longer be national economies (1991: 3)

Others are less assured about the inevitability of global, economic homogeneity. Porter (1986:5), for example, writing in relation to the firm, argues that, " there is no one pattern of international competition nor one type of global strategy". Gordon (1988) contends that changes in the global economy represent the decay of the post

war economic structure and not a new economic order. For Ruigrok and van Tulder (1995: 168-169), the concept of globalisation is a "myth", based upon confusion and an absence of information. For them, it is only one of a number of terms that can be used to describe the restructuring of the international economy. Their research on global corporate activity has led them to conclude that firms, however internationally dispersed, have been unable to break away from a dependency upon their core, national base. For these commentators, globalisation is better described as a process of *Triadisation*. This is the notion that the world economy is essentially divided into three economic axes. This "triad" is dynamic and developing, but centres on the European Union, the United States and Japan. Each of these trading blocks is characterised by powerful political, institutional and economic individuality. It has also been suggested, however, that the growing influence of such a triad might well impede the development of a genuinely global economy (Humbert 1996; Ruigrok and van Tulder 1995; Marginson 2000).

Developing their analysis, Ruigrok and van Tulder (1995) present evidence to suggest that large firms trade primarily on a regional, rather than a global basis, and reason that there are two rival strategies for corporate growth. Globalisation involves world-wide outgrowth based upon intra-firm activity and homogenous management strategy. Glocalisation describes a business strategy based upon the concentration of activity within the three world trading blocks and through inter-firm relationships. Whereas globalisation leads to a growth of international trade, glocalisation, through its focus on production *within* major markets, might lead to a reduction of international trade.

Humbert (1996) is also a sceptic, noting that empirical observation is typically not matched by theoretical rigour. Nonetheless, he suggests that a process of globalisation, characterised by four features, has superseded internationalisation. Firstly, the *international* economy, defined by broadly inter-nation trade reflecting national economic self-interest, has begun to break down. Secondly, although based upon economic power, there continues to exist an international hierarchy of nations. It is suggested that the development of trading blocks and particularly the relationships both within and between these blocks now reflect a qualitative shift from previous forms of international trade. Thirdly, the rapid development of technological systems has transformed the speed and efficiency of international communications. Fourthly,

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the speed of technological innovation has led, on a global scale, to increasing levels of co-operation between small firms and large MNCs.

Others commentators, whilst accepting the nebulous definitional status of globalisation, nonetheless take it as a "state of fact" (Chesnais 1996). Thus, the OECD has defined globalisation as:

> [T]he stage now reached and the forms taken today by international production [...] in which an increasing fraction of value and wealth is produced and distributed world wide through a system of inter-linking private networks. Large multi-national firms operating within concentrated supply structures and capable off taking full advantage of financial globalisation are at the centre of this process. (quoted in Chesnais 1996: 12-13)

For Chesnais (1996), globalisation refers to two intimately related processes. The first is the emergence of global oligopoly and the second refers to a reduction in national political and economic sovereignty. Hertz (2001) develops these themes further. She contends that large global organisations are now so powerful that they are able to play politicians and governments off against each other. By threatening to relocate their operations, such organisations are able to influence national corporate and personal tax regimes in a way hitherto thought impossible. She cites examples of German corporate pressure as evidence of this tendency. Likewise, firms are now able to set social and global agendas in a way that national governments cannot. Greater social standing and improvements to the bottom line can be achieved in the process. Paradoxically, Hertz also suggests that corporate giants are now involved in the provision of welfare benefits that national governments either cannot or chose not to provide and quotes Sir John Browne, chairman of British Petroleum as saying, "The simple fact is that business needs sustainable societies in order to protect its own sustainability" (ibid: 175). Given the sheer weight of evidence against this line of corporate benevolence, Hertz accords such platitudes far more significance than they perhaps deserve.

Humbert (1996) further criticises the use of the term globalisation in its use as a synonym for the activities of multi-national companies (MNCs). If the effects of globalisation are examined at a mechanistic level of detail, the workings of MNCs are of considerable interest. Debates concerning the nature of MNCs and the relationship between MNCs and the nation state are well-developed (Ohmae, 1990; Hirst and Thompson, 1996; Edwards, 2000; Coller and Marginson 1998; Bartlett and Ghoshal

1989; Radice, 1997). For Hyman (2001), the enhanced international activity of MNCs within the context of reduced national regulation is a key feature of globalisation. Indeed, it is through the activities of MNCs that for many citizens of the EU the effects of globalisation will be experienced (Hertz 2001; Edwards 2000). Moreover, it is the activities of MNCs that have in large measure stimulated debates on the issue of Anglo-American business methods and their impact on industrial relations and social partnership. The combination of globalisation and the project of the European union have, it is suggested, enhanced the drive for mergers, strategic alliances and joint ventures (Ferner and Quintanilla 1998; Marginson 2000; Brown and Crompton 1994).

Conceptualising change: Towards Post-Fordism

A number of models and theories have attempted to capture and explain the changes that have taken place in the world economy over the last twenty-five years. These analyses coalesce around a search for "what comes next". Many concepts have been developed. These range from notions of society that are "Post Industrial" (Bell 1973) or "Post Modern" (Clegg 1989), and based on models of "New Competition" (Best 1990), "flexible specialisation" (Piore and Sabel 1984) and "lean production" (Womack *et al* 1990) – to name just a few. The designation "post-Fordism has, however, been most widely applied. Analysis has reflected a central interest in new organisational forms and technological development and has fused around the search for a successor to Fordism and the perceived economic limitations of production systems based around mass production.

Fordism

The essential nature of Fordism has been subjected to sustained and detailed analysis and debate (Gramsci 1971; Pollert 1988; Harvey 1990; Jessop 1991; Nolan 1994; Hyman 1994; Schoenberger 1989). Ruigrok and van Tulder (1995: 1) describe Fordism as "the simultaneous growth of productivity and consumption". They further divide the concept into firm generated growth of micro-Fordism and the societal level construction of macro-Fordism. Brown (1994) describes Fordist production methods as being typified by a combination of Taylorist task fragmentation and intensive mechanisation through continuous flow, semi-automatic assembly lines.

Visser (2000:425) categorises the period up to 1973 as the "golden age of capitalism". During this period, Keynesian demand management and the expansion of the welfare state stimulated the Fordist growth phenomenon. Such growth was characterised by the mass consumption of mass-produced, standardised goods, manufactured in large hierarchical organisations using specialised machinery and large numbers of semi-skilled workers. Fordism has not, however, been universally categorised as a homogeneous industrial phenomenon and (Brown and Crompton, 1994:18) make the distinction between the relatively skilled German worker and their specialised semi-skilled counterparts in Britain and France. Nevertheless, Fordism is generally associated with relatively low skill requirements (Kenny and Florida 1993). For Kenny and Florida (1993: 15), Fordist mass production both promoted and was based upon de-skilling and the separation of intellectual and manual labour. This is in tune with Braverman's (1974) conception of the Taylorist separation of conception and execution of work as constituting the central element of capitalist control of the labour process. Harvey (1990) postulates that what ultimately demarks Fordism from Taylorism was Ford's understanding that mass production meant mass consumption and also a new labour process. Ford believed that a new democratic society based upon a novel industrial paradigm was capable of construction through the force of corporate power. In contrast, Pollert (1988) argues that the concept of Fordist mass production, as a "dominant system of industrial relations", is a deeply flawed theoretical construct. In reality a variety of technologies and production systems co-exist. These are a function of the nature of the firm and product markets in which the firm operates.

Analyses of the changing world economy and the processes of globalisation and restructuring have their origins in debates around the "crisis" of Fordism. The demise of the Bretton Woods system for control of exchange rates and the oil shocks of 1974 and 1979, in conjunction with inflationary pressures and declining corporate profits produced a new economic discipline throughout the international economy. This process was in large measure policed by the International Monetary Fund (Kotz 1990; Brown and Crompton 1994; Visser 2000; Kenny and Florida 1993). These developments at the level of the global economy have, it has been argued, accompanied or acted as a stimulus to change both in the organisation of industry and the macro-economy. The rapid advance of new technology and information systems has occurred in parallel with an increasing fluidity of international finance capital. In

the advanced economies, a move away from manufacturing to service industries and the proliferation of small firms has taken place in the context of a break up of mass markets for standardised products. Reductions in the size of manufacturing plants have occurred alongside a decline in the strength of trade unions and collective bargaining. This has been accompanied by an increased demand for flexibility, both in terms of the organisation of business and working methods (Lash and Urry 1987; Visser 2000; Brown and Crompton 1994; Block 1990; Hirschorn 1984; Waddington 2000).

Post-Fordism

The notion of *post-Fordism* implies a qualitative break with the economic processes and institutions that typified the post-war Keynsian economy. As Nolan (1994:165) explains:

> Post-Fordism, (as noted), is defined in opposition to Fordism. Most commonly it is identified with the renaissance of craft work in small and medium sized firms, decentralised production systems and increased product specialisation. These trends in production organisation are traced back to the early 1970s when the crisis of Fordism supposedly took hold. Mass markets are said to have become redundant. Moreover traditional pattern of labour organisation and control, based on deskilling and rigid hierarchy, are deemed inappropriate to the so-called "new times" and the new production and economic paradigm which is taking root in the advanced industrial countries.

Authors such as Boyer (1989) describe a three-part, rather functionalist, process by which the transition from Fordism to post-Fordism can be conceptualised. The first stage involves a characterisation of the essential features of Fordism. The second stage involves documenting the problems and contradictions of Fordism and laying open the limitations and unsustainability of such a production strategy. In response to this, the final stage attempts to identify potential solutions to the crisis of 'Fordism' and propose the elements of an alternative paradigm. Kenney and Florida (1993) argue that whatever model is proposed as a replacement for contemporary capitalism, the central features appear to converge around a changed organisation of production and the impact of new technologies. Brown and Crompton (1994) also assert that changes in labour markets have been accompanied by a substantial change in the pattern of state intervention. They contend that such developments, in the context of a

crisis of productivity, are part of capital's response to workplace resistance towards Taylorism.

Ruigirok and van Tulder (1995) argue that since most writers on the subject attempt to gain insight at a single level of analysis only, for example at the level of macroeconomics, the notion of post-Fordism has limited analytical power. Furthermore, post-Fordism is, they suggest, vulnerable to being used as an ideological rather than an intellectual construct and as deterministically representing the conclusion of an inevitable historical process. Similarly, Pollert (1998: 50) argues that the post-industrial discourse is "refracted through an ideological lens" and based upon empirical evidence of doubtful quality. A cataclysmic decline in mass markets has not occurred, nor is there a clear distinction between semi-skilled mass production on the one hand and high skill flexible manufacture on the other. Competition inevitably leads to marketing strategies that manipulate and fragment demand. For Pollert, the "crisis" in mass markets is actually a crisis of over accumulation in the capitalist economy. More recently, Hertz (2001) argues that over the last twenty years processes of privatisation, deregulation, trade liberalisation and advances in communication systems reflect a global "power shift". She describes how 20 percent of global foreign assets are now owned by the 100 largest MNCs, and that 51 of the 100 biggest economies in the world are now companies. If an accurate characterisation of the concepts of Fordism and post-Fordism are problematic, changes in the organisation of the global economy have undoubtedly taken place.

A number of constructs have been proposed as representations of the contemporary global economy. Academic work in this area has attempted to investigate the concepts of post-Fordism and restructuring at several levels of the economy. Two principal but overlapping approaches have been taken. One body of work is rooted in how, at an organisational level, firms are responding to changes in the global economy. The second approach attempts to gain an understanding of restructuring at the level of the economy as a whole. Kenney and Florida (1993:13) argue that an analytical preoccupation with organisational form and the social division of labour is important but constitutes a "second order phenomenon". They propose that the task of fundamental importance is the analysis of developments at the point of production.

A number of approaches based at the macro level of the economy and within an historical perspective have been developed. Amongst these are included, the Amsterdam School, Postindustrialism, Long-Wave Theories and Regulation Theory and flexible specialisation.

- The Amsterdam School characterises neo-liberalism as part of a political project that has triumphed over the monetary and state organisation provided by Fordism (Overbeeck 1990).
- The post-industrial approach regards the economy as having evolved towards a post-industrial world characterised by an increase in information systems and service industries. These developments have occurred at the at the expense of manufacturing (Bell 1973; Block 1990).
- Long wave theories contend that capitalism can be seen as a continuum of linked stages delineated from each other on the basis of technological development and organisational forms. Within this construct, Fordism is in crisis because existing institutional and organisational forms are unable to support new technologies (Mandel 1975; Freeman 1984).
- Regulation theory contains a number of strands that rest on the assumption that structural crises in capitalism occur in response to a disjuncture between the regimes of accumulation and modes of societal regulation (Aglietta1979). Crisis occurs when the mode of regulation is in conflict with the mode of accumulation. This might occur when the rate of accumulation reduces over a period of time. This perspective differs from that of the "Long Wave Theory" through its acceptance that it is the forces of the relations of production that ultimately determines economic and social structures. Within this construct, neo-Fordism postulates that the current period is not, it seems, a break with Fordism, but rather an extension - a development - of it (Aglietta 1995). Others within this tradition regard the power of technology as having induced a distinct, qualitative break with Fordism (Roobeek 1987).
- The "flexible specialisation" thesis of Becattini, developed by Piore and Sabel (1984), perhaps epitomises the typical categorisation of the post-Fordist economy. Piore and Sabel argue that mass production techniques and Tayloristic forms of work organisation acted as brakes on the potential benefits of developments in

technology and hence undermined economic competitiveness. The decline of mass production provides the conditions for a re-emergence of craft production or flexible specialisation. For Piore and Sabel, the process of flexible specialisation is posited on the existence of industrial districts, such as those of Emilia-Romagna in Italy and the German district of Baden-Wurtenberg. A central assumption of this thesis is that changes in the requirements of markets determine the appropriate model of production. Lash and Urry (1987:196-201) also contend that in the advanced capitalist countries there is a strategic shift away from the mass production of uniform goods. The trend is towards the manufacture of speciality products in smaller workshops, "often using state of the art technology" where permanent innovation provides the basis for niche production strategies. Multi-skilling within a community of skill (based on the industrial district) is regarded as a central feature of flexible specialisation. The causes of such developments are suggested to be the advancement of technology (particularly microelectronics), changes in consumer taste and, in response to competition from newly developing economies, a necessity for competition on the grounds of quality as opposed to price.

The model of flexible specialisation implies a generality that can be applied to large multinational corporations (Hirst and Zeitlin 1989). This is witnessed in debates around lean production (Womack *et al* 1990). Furthermore, the post-Fordist trajectory is taken to be the only possible route to long-term economic success. Flexible specialisation has, however been subjected to criticism (Williams *et al* 1987; Hyman 1988). Cough (quoted in Elam 1988) argues that it fails to take account of the strategic options available to producers. Pollert (1988) notes that flexibility in the production process is not a new phenomenon and that labour flexibility is a continuing requirement of capital. Furthermore, flexible specialisation is a deeply flawed concept that "does not bear up well to empirical scrutiny". In support of this contention, Pollert (1988) argues that product diversity has always been a feature of mass production and producers consciously manipulate customer tastes as part of marketing strategy. She also asserts that flexible production does not necessarily equate to small production units, is not necessarily achieved by the use of technological innovation and does not automatically lead to the generation of a multi-skilled "craft" workforce.

Finally, Pollert contends that small firms do not have an advantage over larger organisations in the utilisation of new technology. Indeed, the small firms that characterise the industrial districts upon which the model of flexible specialisation is based, are typically structured around low wages, a reliance upon poorly trained workers and generally produce standard, low quality products for fiercely contested markets (Amin, 1991; O'Donnell 1993). At a more theoretical level, Williams *et al* (1987) identify a range of weaknesses with flexible specialisation. These include an inadequate and inaccurate, conceptualisation of the differences between mass production and flexible specialisation, a conceptually confused historical analysis of the rise of mass production, and an overly romantic reading of the 'artisan future' of flexible specialisation.

These criticisms aside, it has nonetheless been suggested that recent processes of state restructuring may have laid the basis for a tendential shift to post-Fordsim, as a combination of globalising and localising tendencies produce forces that displace, or 'hollow out', the power of the state (Jessop, 1993, 1994). For Jessop, this is speculatively conceptualised in term of the replacement of the Keynesian welfare state with a new Schumpeterian workforce state (SWS), the origins of which can be traced to the "flexible accumulation regimes" and supply side orientated states associated with successful East Asian economies. The form of the SWS varies according to the regulatory regime, but vocational education and training are prime components (see Peck, 1996 for a critique).

Similarly, Kenny and Florida (1993), in a detailed analysis of Japanese methods of manufacturing, propose a model of production organisation that in their view supersedes the ideology of and techniques inherent within, Fordism. They forward "Innovation Mediated Production" (IMP) as an approach based on the view that Japanese methods of production have evolved into a phenomenon that is general in nature and not culturally distinct to Japan. Its novelty and effectiveness lies in the fusing together of the inherent intelligence of workers with their detailed knowledge of production systems. Speed of technological advance, the development of collective intelligence, continuous process improvement and a blurring of the lines between research and development and the factory are central features of IMP. Although this model insinuates a liberating process for workers, Kenny and Florida reason that Innovation-Mediated Production actually exploits workers more fully than ever before.

Ruigrok and van Tulder (1995) propose an alternative framework within which the effects of restructuring at the level of the firm the firm can be conceptualised. The framework is constructed around the notion of "concepts of control". Within each concept of control, firms are faced with a number of "dilemmas of control". The dilemmas, such as those posed by the supply chain and labour process, face all organisations when confronted with forces of change. The authors identify three concepts of control that are, within capitalism, simultaneously vying for hegemony. These are Flexible Specialisation, Fordism and Toyotism. Toyotism, according to Dohse (1985), describes the process of gaining efficiencies in the production process through fast production lines and the grouping of tasks. Toyotism is also considered less bureaucratic and more flexible that Fordism. Within the paradigm of "concepts of control", firms are said to exist in an environment defined and constrained by an "industrial complex" Industrial complexes are described as "centres of gravity in an international restructuring race" and consist of a bargaining arena composed of six actors. These actors are the core firm, the supplying firms, dealers and distributors, workers and unions, financiers and finally governments (Ruigrok and van Tulder, 1995: 63-90). These commentators contend that the process of international restructuring is most effectively studied as a race between industrial complexes adhering to rival concepts of control.

The restructuring taking place in the world economy is clearly impacting at many levels. Within the EU, the processes of political integration, the effect of EMU and the development of the EES will engender further levels of complexity. It is to these issues that the review now turns.

Europe

Teague (2001) outlines two approaches to the analysis of European integration. "Intergovernmentalism" describes a process of integration based upon sovereign states. States within the EU co-operate to their political and economic mutual advantage, whilst national sovereignty is maintained. "Neofunctionalism", by contrast, is concerned with the conditions under which national allegiance is superseded by that of loyalty to the European Union (Haas, 1958). Teague argues that neither of these processes captures the essence and evolution of the EU. Instead he

suggests that *deliberative government* (Sand, 1998) and, particularly in the field of social policy, *engrenage* (Meny *et al.*, 1996) are shaping the nature of the EU. Deliberative government is the unintended consequence of a pragmatic response to European level policy making. Such pragmatism reflects a lack of support by either EU states or the EC for a major distribution of power to a supra-European authority (Teague, 2001). Deliberative governance, it is suggested, is made possible by three key features of supra-European policy formation. These are the power to form policy at the EU centre, the adoption by the social partners of a problem solving, deliberative approach to conflict resolution and "cross jurisdictional learning". Cross-jurisdictional learning is said to occur through the mechanism of sharing practices and policies. Benchmarking is a major source of such learning. The process of *engrenage* can be defined as "the deepening of interactions between national administrative structures and EU institutions" (Teague, 2001: 16), and is a largely informal process of interaction and communication that acts to either advance or retard the development of EU policy. For Teague, *engrenage* is central to the (re)shaping of European employment policies. The European Employment Strategy, it is suggested, exemplifies this approach. Teague also contends that EU social policy is straining the bonds between economic citizenship and the nation state. The EU does not, however, posses the institutional capacity to replicate existing national social systems.

For Marginson (2000), Europe is a regulatory space that is in many ways distinct from the wider processes of internationalisation. However, both Marginson (2000) and Roche (2000) argue that the EU does not in reality constitute a single, homogenous socio-economic structure. In terms of its history, economics, politics and culture Europe is a highly complex entity. The EU might well be engaged in an attempt to respond to the influence of the global economy in a coherent fashion, yet the consequences of rapid technological development, changing patterns of production and distribution and the practices of MNCs are producing considerable forces for change (Ferner and Quintanilla, 1998; Marginson, 2000; Edwards, 2000). For Brown and Crompton (1994), one possible outcome of such pressures is the creation of a two tier European economy. One tier based upon high skill, high quality production, the other on a relatively low skill base and structured along Fordist lines. Within this field of controversy the notion of path dependency has been widely discussed. Firms that display high levels of technological competence and innovation generate elevated profits and increased levels of market share. This process both feeds

and is fed by firm specific and path dependent features of technological change (Pavitt 1992). In reference to path dependency, Kenney and Florida (1993) argue that economies evolve not only in response to the single dimension of technological change but also in answer to tensions between technology and social systems. The locus of change is centred on production systems at the point of production. For these writers it is the production system within capitalism that over time reflects path dependency.

The potential effect of monetary union and the European Employment Strategy are of considerable interest to many observers. Commentators such as Hyman 2001 and Barnard and Deakin 1999 have noted the possible deflationary effect of EMU and its requirement to hold down social costs and wage levels. The public perception of such potentially deflationary effects of EMU has created problems for politicians and business leaders who see monetary union as being of critical importance for defence of the European economy (Goetschy 1999). To this end, Goetschy contends that the EES is in part a mechanism for allaying public fear about the effect of EMU. It is has also been argued by Barnard and Deakin (1999), that the establishment of Employment Title of the Amsterdam Treaty in effect signalled the defeat of proposals for reflationary demand side macroeconomic intervention in the EU economy. One consequence of this has been the substitution of (the aim of) "high" employment for "full" employment (Barnard and Deakin 1999; Pierson et al 1999). Also, the Maastricht Treaty outlines the centrality of labour market flexibility to the attainment of high levels of employment. This is mirrored in the EES pillar of adaptability that contains within it the same requirement for flexibility alongside increased deregulation.

Teague (2001) is more upbeat about the ability of the EU to develop structures that are supportive of a social dimension. He is of the opinion that within the ruling elite of the EU there resides a genuine commitment to the development of a brand of capitalism that eschews pure neo-liberalism. Thus, Teague (2001: 21) notes that, "those accounts that dismiss Social Europe as a side-show to the market-making activities of European integration are either too negative or assess EU policy against unrealistic or inappropriate benchmarks".

At both a global and European level, forces for economic change are impacting on social institutions and society in a dynamic and contested fashion. In this context, Williams (1983) perceives that the governments of Europe are

demonstrating a common lexicon and approach to the perceived policy requirements of competitive advantage. In fact Hyman (2001) describes the EU as a market making process designed to defend Europe from other, competing, global trading blocks, and that monetary union through the mechanism of EMU is a response to the volatility of global finance. However Kennedy (1996) predicts that the power and speed of globalisation will create a devastating effect on the economies of developed nations. For him, increased competition from newly developing nations will lead to a downward wage spiral that will strain the institutions of co-determination and processes of social partnership and ultimately lead to political instability. The European Union (EU) has responded to intensified levels of economic competition and its critical impact upon employment levels in a number of ways. European Monetary Union (EMU) is the response at the level of the macro-economy. The European Employment Strategy (EES) is the response to changes in the labour market. The stated task of the EES is to "support member states and the social partners in their efforts to modernise" (The European Employment Strategy: Investing in People, 1999). The importance ascribed to the development of social dialogue, employability and lifelong learning is made clear in both the EES and in, for example, the European Commission (EC) Green Paper, "Partnership for a new Organisation of Work (1997) and "Towards a Europe of Knowledge" (DG XII 1997). It is to the issue of lifelong learning that the review now turns.

Chapter 2

A Europe for Lifelong Learning

For both policy makers and the academic community, the discourse surrounding notions of lifelong learning is complex and interwoven with many other debates. Questions on the nature of learning, the learning society, the learning organisation, employability, skill formation, human resource management, adult and informal education, personal development and training are all posed.

Terminology and meaning

Within the literature the terms learning, training, education and skilling are often used interchangeably and are often conflated. Similarly, the term lifelong learning is frequently used as a synonym for lifelong education. Within this discourse the terms recurrent education and permanent education are also utilised (Harris 1999; van der Zee (1991). Merriam and Brockett (1997) have attempted to differentiate between the two processes of learning and education. For them, *learning* is an activity that takes place in an either incidental or planned fashion whereas *education* is an exclusively planned process. Writers such as Yeaxlee (1929) - in developing the theme of lifelong education and the work of UNESCO notably in the form of the report, "Learning to be" by Edgar Faure (1972) - employ the terminology of *lifelong education*. For Raggat *et al* (1996) however, a focus on learning, as opposed to training, or education, lays the emphasis for learning upon the individual and allows a withdrawal of responsibility for learning by the state. Harris (1999) in developing this theme contends that between the 1970s and the 1990s a shift in the meaning of lifelong learning has occurred. This shift is manifested by changes in the three characteristics of rationale, focus and terminology.

A change in the rationale of lifelong learning has occurred through a shift in emphasis from the social benefits of lifelong learning to the primacy of economic factors. The focus of lifelong learning is evolving from one based upon formal educational processes to one based upon the employer and the workplace. Similarly the term *learning* has replaced that of *education*, in recognition of the fact that *learning* in a very much wider setting (than formal education) is now a central feature

of (working) life. Harris also notes that a major driving force towards such an "economic–technological" version of lifelong learning is the move from an industrial and service economy to one based upon knowledge. The shift in emphasis in the meaning of lifelong learning continues to be a matter of much debate. Tuijnman (1992), for example, argues that employer-led industrial training makes good sense as a cost-effective means of skill development for the restructuring of work. Seddon (1998), in contrasts, warns of the dangers to economic well being of the neglect of the social dimension of training. Furthermore, as Coffield (1999) observes, lifelong learning as a process or strategy manifests itself as a force for change, a barrier against change, a means of enhancing personal development and economic competitiveness, part of social policy to combat social *exclusion and to enhance employability*. In short, Coffield argues that the notion of lifelong learning can be conceptualised and understood at a number of levels that are in turn contingent on the *agenda* of those involved in its conceptualising.

Woodrow (1999) has usefully collated a number of interpretations of lifelong learning. These variously describe lifelong learning as a paradigm, a principle, a process, an attitude, a platitude, a form of capital or a means of subsistence. Thus:

> "The paradigm of lifelong learning, linked to the vision of a learning society, has been widely accepted in theory and in political declarations" (Council of Europe 1998).
>
> "Lifelong learning is a composite principle which when followed, ensures a broadly based and continuous process of learning throughout society" (Department for Education and Science Policy, Finland; 1889)
>
> "Lifelong Learning is a process for combining formal and informal learning. A natural form of everyday learning is an important starting point for any lifelong learning for all" (Alheit 1998)
>
> "... a natural part of everyday lives of all men and women throughout the world" (UNESCO 1998)
>
> "... follows a logic of accumulation, not of compensation. It is thus firmly rooted in the classical mechanisms of inequality. It turns out to be a first rate source of social positioning" (Levy 1998)
>
> "... part of the rhetoric of individual adaptability to change. The point is to fit in with the established order not to change it" (West 1998)

The definition of lifelong learning initially proposed by the European Commission in the Memorandum on Lifelong Learning (2000: 3) was "all purposeful learning activity, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence". This definition of lifelong learning attracted criticism during the consultation exercise on the Memorandum. Concerns were expressed that the labour market dimension was overemphasised, with the spiritual and cultural dimensions of learning underplayed. The Commission response to the consultation exercise, "Making a European Area of Lifelong Learning a Reality" (2001), offers an extended definition around the four objectives of personal fulfilment, active citizenship, social inclusion and employability and adaptability. Lifelong learning is now defined as "..all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competencies within a personal, civic, social and or, employment related perspective" (ibid: 9).

Woodrow (1999) argues that the temporal nature of lifelong learning is poorly characterised and widely interpreted. Thus, the OECD (1997) defines "lifelong" in terms of "all people of working age". In the UK, *The Learning Age (1998)* Green paper emphasises the inclusion of the retired, while in Finland policy towards lifelong learning embraces the period of pre-school education. The concept of *lifewide* learning, that is the breadth of learning that can occur across the full spectrum of the life course, has attracted discussion amongst both academics and practitioners in the field of "learning". In this regard, the Memorandum on Lifelong Learning (2000: 8-9) introduces the concept as reflecting the complementarity of formal, non-formal and informal modes of learning.

Beyond the political, economic and prescriptive character of lifelong learning, there exists an extensive literature on its educational and philosophical characteristics. Although it is beyond the scope of this review to appraise this debate in any great depth, it is useful to summarise the main strands of thought within this field of enquiry (see Aspin and Chapman (2000) for a discussion of some specific philosophical issues that underpin learning).

Bagnall (1990) suggests that lifelong education has been represented in the literature in four main ways (cited in Aspin and Chapman, 2000: 3).

- The preparation of individuals for the management of their adult lives (White 1982:132)

- The distribution of education throughout an individual's lifespan (Kulich 1982)
- The educative function of the whole of one's life experience (Pena-Borrero 1984)
- The identification of education with the whole of life (Lengrand 1979)

Aspin and Chapman (2000) argue that there are two main schools of thought governing any "essential and agreed" definition of lifelong learning. The first of these is associated with the UNESCO Lifelong Education Unit, and is described by Cropley (1979) as the "maximalist" position. The other school of thought regards lifelong learning as "an extension of the deliberate and planned interventions characteristic of 'education proper'". The maximalist outlook sees lifelong education as involving a fundamental transformation of society, with society becoming a learning resource for every individual. Kenneth Wain (cited in Aspin and Chapman, 2000: 6) suggests that John Dewey was the intellectual progenitor of both the UNESCO programme and maximalism. Dewey (1966: 76) decrees "the need for a lifelong education which is a constant reorganising or reconstructing of experience". According to Wain, this is not equivalent to simply equating life experience with education; rather, learning is experience that adds to the *meaning* of experience itself. Learning is categorised as being contextually specific and as producing directed intellectual growth. It is not considered to be the case that all of life's experience is education. If this were true, it is argued, there would be nothing to distinguish education from life. In other words, experience, as opposed to mere activity, is a process that connects activity to causality. However, in order to learn from pure experience - to help act in an informed way in respect of future problems and events - there is a requirement for thought or reflection. This act of enquiry connects experiences with the consequences of experience and leads to learning experiences that can guide future action. Van der Zee (1991) argues against such a distinction. In his view, learning is the whole of life and the whole of life is learning. Similarly, for Tennant (1997), learning from experience is part of daily living.

The maximalist position has been criticised by Bagnall (1990) as being relativistic, highly programmatic and hence illiberal. Bagnall also takes issue with the position that lifelong education is synonymous with conscious involvement in the activity of life. For Bagnall, education of any kind is defined by a differentiation

between intelligent activity and formally acquired knowledge, described as "education proper" and knowledge obtained merely from an accumulation of experience.

For Aspin and Chapman (1994) it is not possible to arrive at a consensually agreed absolute definition of lifelong education. Instead they propose a more pragmatic schema. This is based on an identification of the key concerns of policy makers of the day, such as the role lifelong education might play in the amelioration of the more negative effects of global economic competition. Once such issues have been acknowledged, policy makers, academics and interested parties identify common ground and, by a process of enmeshment, meet to test theories and develop policy. In a powerful intervention, Coffield (1999:18) argues, however, that debates around lifelong learning need to be rescued from all sectional interest groups.

Learning Society, Learning Organisations

The literature on lifelong learning is wide-ranging and often undiscriminating. It is, however, typically linked to the concept of a learning society, and debates around the "learning organisation" (see Argyris and Schon 1978; Senge 1990; Pedler and Aspinwall 1998). Coffield (1999) bemoans the fact that the sentiments and vision attached to both lifelong learning and the learning society by the Faure report (1972), with its emphasis on a democratic coalition between education and industry and the development of human potential, have, in the UK at least, been subverted by the "master" concept of flexibility. For Coffield (1999: 15), this concept has produced not a learning society but "a flexible society fit for globalisation". Edwards (1997) describes three outlooks on a learning society. Such a society can represent an educational society committed to liberal democracy and equal opportunities, a learning market where individuals are provided with educational services in return for support for a market economy, and a society where learners adopt a learning approach to life in the context of their perceived individual needs. Van der Zee (1991) has portrayed a learning society as one that collates and harmonises the learning needs of individuals as they attempt to comprehend and come to terms with the forces of modern capitalism. He suggests that a number of criteria need to be met in order that such a society can be developed. These include a right to learn, a need to foster self-education, a necessity for increased collective competence and the necessity for education to be defined as a fundamentally important dimension of life. Coffield

(1999) argues that irrespective of the nature of debates on a learning society, the socio-economic context is provided by capitalism, or in Coffield's (*ibid*: 15) words "capitalism is the only show in town" (ibid: 15). Thus, because the nature of capitalism cannot be ignored, attention must be focused upon modes of regulation and government. Pursuing this analysis further Coffield refers to Sennett's (1998) argument that what must be asked of the corporate world is how it intends to serve civic interests and not merely the balance sheet. For Coffield (ibid), the role of the social partners, business, trade unions, the state and education is crucial in curtailing the power of corporate power and developing a discourse on lifelong learning and the learning society. He further proposes that at the level of the firm employers should develop learning agreements with trade unions. Such agreements need to lay out the rights and responsibilities of both parties. In a similar vein to Van der Zee, Coffield (ibid) puts forward the view that for the realisation of a learning society based on notions of lifelong learning, four steps are necessary. These are the establishment of a new social contract between the state, business, the trade unions and education; the evolution of an appropriate model of change; tackling inequalities and structural barriers to learning and the development of a new social theory of learning for a learning society.

Ball (1996) envisions both a learning society and learning organisations as being based firmly upon the individual. Just as lifelong learning is increasingly conceptualised as a necessary response to changing economic conditions so the responsibility for learning is passed to individuals who are exhorted to regularly update their skills in order to retain their employability. This resonates with the notion of the "risk society" and the tendency for the modern state to offload certain risks onto the individual (Beck 1992). In this context policy makers increasingly see lifelong learning as an essential, prerequisite, for facing up to economic uncertainty. That this is the case is exemplified in the European Commission White Paper, "Teaching and Learning: Towards the Learning Society" which states, "....the move to the learning society must be centered on the individual." (1996:51).

Commentators such as Tight (1998) and Darmon *et al* (1999) suggest that throughout Europe conceptions of lifelong learning and a learning society are being used as polemics for mechanisms of social control (see also Coffield, 1999). Individuals are increasingly socially constrained to accept employer demands for increased flexibility with the promise of employability used as a cover for a political

retreat from a commitment to full employment to a future based upon uncertainty and insecure employment. Coffield (1998) is highly critical of the view that an individual lack of skills or a simple mismatch between skill levels and vacancies are sole reasons for unemployment. He contends that the relocation of industry, automation, changes in production systems, lack of investment, interest rates, increased international competition are all part of the explanation for lack of employment opportunities. Coffield (ibid) also enlists the work of Ryan (1971) to argue the case that to single out an individual's lack of qualifications as constituting the main cause of unemployment is a policy of blaming the victim. This tactic has as its function the blockage of social change and the maintenance of the interests of powerful groups in society.

The role of trade unions is of importance in the dynamics of social control, particularly at the workplace. Darman *et al* (1999), however, consider that trade unions are being entrapped by their willingness to trade off flexibility for increased training as a potential mechanism for increasing the employability of their members. Any such process of subornment is tied to the perspective of each trade union and also crucially to the social contexts in which they exist. Within continental Europe the general societal acceptance that workers and employers have different interests that can be legitimately and collectively represented might be expected to perhaps act as a bulwark against total entrapment. Within the UK the Trades Union Congress and many large and influential unions, AMICUS for example, are committed to the business agenda of the Labour government. This orientation might well provide the conditions for a "trap" such as that described by Darman. However the great interest within the UK trade union movement for the establishment of trade union "learning representatives" and the perception of such representatives as future shop-stewards, might imply that the discourse of learning is providing a possible, conscious, route to trade union renewal within the UK.

At the micro level, Huzzard (2001) argues that there now exists a growing literature pointing to the managerialist and unitarist assumptions of learning organisations. Coopey (1995, 1998) categorises contemporary organisations as demonstrating a general deficit of trust relations and processes of democracy. These features act in conjunction with skewed power relations to inhibit sustainable learning. It is only when authentic voice is given to employees that the levels of trust needed for learning can be realised. Elkjaer (2001) in case study work in a Danish public enterprise has observed the same phenomenon. In the minds of employees, the

prospect of a learning organisation created notions of organisational democracy. In contrast to this, management strategy focused on an attempt to change individuals, whilst leaving prevailing organisational power structures intact. This led to disillusionment with the concept of a learning organisation and was, in Elkjaer's view, the reason that a learning organisation did not develop. Yet, in support of the learning organisation, Senge (1990:4) argues, "the ability to learn faster than your competitors may be the only sustainable competitive advantage". If this is now indeed an economic imperative then the pragmatic approach to workplace learning identified by Huzzard (2001) might be a way forward. He argues that in the context of increasing global economic competition, the route to *simultaneous* improvements in pay and conditions and job security will be increasingly blocked. Whilst accepting and in many respects supporting critiques of the learning organisation, Huzzard, through case study work in Swedish manufacturing plants, contends that, through a tactic of engagement with the discourse of learning, unions have achieved "small wins " for their members. Such small wins included job enlargement and new payment systems based upon competence development.

Learning – individual or social?

For Coffield (1999), the construction of a learning society, based upon the practice of lifelong learning, requires an adequate theorisation of learning. Coffield argues that such theory is currently absent. Two principal schools of thought on the learning process are those centred around the behaviourist and the cognitive outlooks. These are succinctly described by Race (2001). Behaviourism is based upon input stimuli that lead to outputs in the form of learned behavioural change. The cognitive approach focuses on "perception, memory and concept formation and on the development of the ability to demonstrate understanding of learning by solving problems" (Race 2001: 2). Both of these schools of thought emphasis the role of the individual, something which Coffield (1998) argues is deeply problematic. Indeed, for him, "It is the heavy concentration on the role of individuals which is the weakest aspect of both British and European policies on education, training and employment" (Coffield, 1998:46). Coffield (1998) proposes, therefore, a *social* theory of learning. Such a theory accepts that learning is not just an epistemological process based upon individual cognition, but goes beyond ideas of learning as self-direction and is

fundamentally social in nature (Brown and Duguid 1991; Catino 1999; Cook and Yanow 1993; Elkjaer 2001). To this end, Coffield (1998) cites the work of Lave and Wenger (1991) on non-formal learning, as offering a way forward for the development of theory.

Lave and Wenger describe learning as socially situated and embedded in "communities of practice". For them (1991: 31), "learning is an integral and inseparable aspect of social practice". It is also a product of social interaction, underpinned by situation, not simply an individualistic cognitive process. Furthermore, learning takes place not in a notional, abstracted universe but in a social world that is "dialectically constituted in social practices that are in the process of reproduction, transformation and change" (ibid: 123). This model continues to be influential, although for Keep (2000) it is somewhat overused. Their work is also 'on the whole silent' of issues around power and control, as they themselves accept (Lave and Wenger, 1991: 86). This omission might be problematic for the use of this approach as the foundation for a theoretical model of a learning society within a developed industrial economy. Elkjaer (2001: 440) whilst supporting the approach of Lave and Wenger, suggests that when it comes to providing an actual guideline for developing organisational learning and learning organisations "the concept operates on a fairly abstract level" and does not address the *method* of learning. Neither is an explanation given as to *how* learning arises from participation or *what* can be learned from participating in communities of practice. However, Lave and Wenger themselves suggest that whilst their work focuses on the social conditions for learning, it is essentially an "analytical perspective" (ibid: 39).

From a different trajectory, Harris (1999) suggests that "network theory" might provide a more useful model for exploring and understanding learning in the workplace. This theory supposes that organisations consist of and are contained within, a series of networks. The *learning network* and the *work network* are of particular significance. The work network is organisationally specific and provided by the dominant pattern of work, the way that work is conducted and constructed over time by workers' themselves. For example, work might take place in relative isolation or within large groups of other workers, within a factory or office environment. The employment context provides the objective substrate within which any learning is anchored. The learning network evolves from the work network, the type of training offered and the way in which workers shape their own learning process over time.

The extent to which workers are expected to learn individually or in groups, the degree of employer support and the provision of external trainers for example, are factors that will contribute to the formation of a learning network. Such networks, Harris contends, dynamically interact and change through time. Although this outlook implies absorption of workplace dynamics, it is not unreasonable to speculate as to the extent that such an approach in reality captures the dialectically constituted (and contested) processes of everyday workplace learning.

National and European Dimensions

Although Davies (1999) is in no doubt that the learning society is becoming an international reality, the UK government in its White Paper, "*Learning to Succeed*" (1999), concedes that the UK, at least, is a long way from this goal. Also, within the EU, national traditions and institutions will both refract and ameliorate attempts to develop overarching pan-European policy. Thus, in their evaluation of education and training within the EU, Demeulemeester and Rochat (2001) strongly question the ability of European level policy making to succeed in the development of a unified European perspective in this field. They argue that barriers to success will include the politically heterogeneous nature of the EU and, perhaps somewhat more fundamentally, the reality of profit maximising firms, particularly those of a multi-national nature, deciding for themselves their best route to profit. It has been argued elsewhere that not only individual firms but also perhaps whole economies can quite rationally adopt a low quality, low skill route to competitive success (Finegold and Soskice; 1988).

Heidemann (2000) notes that within Europe there exists a wide range of systems and approaches to vocational training. He draws out distinctions between the German dual system as a model for initial training, the French system as a model for regulation and the "NVQ" system of the UK as a model for certification. These alternative approaches in many ways reflect differences in national education systems and are likely to impact on mechanisms designed to propagate a pan -European system of lifelong learning. Coffield (1999:12) notes, for example, that countries such as France and Spain have developed policies that are attempting to limit the ability of firms to excessively increase the flexibility of the conditions of work. In the case of Spain, the social partners agreed to the application of a training tax on both employers

and employees, half of which would be devoted to help train the unemployed. A distinction can also be drawn between countries with a dualistic approach towards vocational training involving a combination of taught courses alongside in-house company training and those with an essentially school based approach.

Keep (2001) asserts that the Anglo-Saxon approach to learning at work, based as it is on the concept of the "practical man", intrinsically undervalues the theoretical aspects of skill formation. In the context of the UK a predilection for the notion of "competency" has further exacerbated this phenomenon. Keep also notes that Europe is increasingly influenced by American firms and hence employment ideology. This might, in his view, increasingly propagate the low levels of interest shown in employer-led training in the USA. Both these observations might be of some concern to advocates of the European approach to skilling and learning.

At the pan-European level, both putative and actual policy makers have commented widely on the concept of lifelong learning. The Eurydice (2001) bibliography on lifelong learning listing a range of publications and reports published since 1994 is testament to this. Demeulemeester and Rochat (2001) in their SKOPE report offer a wide-ranging critique of developments in EU policy on education and training and the impact of such policy in the area of lifelong learning[1].

The European wide consultation exercise on lifelong learning published as a Commission Staff Working paper, "A Memorandum on Lifelong Learning" (2000) has acted as a focus for contemporary discussion on lifelong learning. As a next step, by the end of 2003, the Commission will issue a report to the European Council and the European Parliament on the implementation of a framework for lifelong learning. The results of the consultation exercise appear in the Commission's communication document '*Making a European Area of Lifelong Learning* (2001)' and the accompanying CEDEFOP document '*A Review of Member State and EEA Country Reports*' (2001). The objective of the consultation was to collate opinion on how to progress the development of lifelong learning within the arena of the EU. These documents make it clear that Lifelong learning is an EU priority horizontal theme within the Employment Guidelines emanating from the Treaty of Amsterdam and the European Employment Strategy (EES). The EES pillar of *Employability* places much emphasis on the need for lifelong learning. Advocated here is a "partnership

[1] SKOPE is for the Research Centre on Skills, Knowledge and Organisational Performance, based at the universities of Oxford and Warwick in the UK.

approach" as the first building block within the EU strategy for lifelong learning (Making a European Area of Lifelong Learning a Reality 2001:4; CEDEFOP 2001: preface).

The Memorandum on Lifelong Learning advances the view that there are two equally important reasons why lifelong learning is a top priority for the EU (2000:5). Firstly Europe has moved towards a knowledge-based economy and society. The ability for European citizens to be able to function effectively within such a knowledge driven society is the key to "strengthening Europe's competitiveness and improving the employability and adaptability of the workforce". Secondly, in an ever more complex world, education in its broadest sense is pivotal to enabling citizens to plan their own lives and actively contribute to society. The Memorandum continues by emphasising two important aims for the process of lifelong learning. These are the promotion of active citizenship and employability. In response to the consultation exercise, the Commission document '*Making a European Area of Lifelong Learning*' (2001:3-4), notes that the concept of lifelong learning should be broadly defined and not limited to economics or adults education. Lifelong learning should extend from pre-school to post retirement and encompass formal, non-formal and informal learning. Furthermore the objectives and principles underpinning lifelong learning should include personal fulfilment, social inclusion, the centrality of the learner and the importance of equal opportunities.

The CEDEFOP review of the consultation exercise, '*A Review of Member State and EEA Country Reports*' (2001:7) reveals that criticism of the Memorandum focused largely around three areas. The first of these criticisms suggests that the Memorandum gave insufficient explicit emphasis to social cohesion and equal opportunities between the sexes and to educationally and socially disadvantaged groups. Secondly, The Memorandum gave too little attention to the diverse learning needs of specific target groups. The Commission accepts that the Memorandum adopted a "mainstreaming" approach judged to be unsatisfactory. Thirdly, the Memorandum was criticised for over-emphasising individual responsibility and underplaying social responsibility for the provision, access participation and outcomes of learning. The Commission response to this specific criticism has been to state that "placing the individual at the centre of learning does not imply placing all responsibility for learning on the individual's shoulders" (ibid: 7). In response to the consultation exercise, the definition of lifelong learning used by the Commission has

been changed. The original definition associated with the consultation exercise was "all purposeful learning activity, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence" ("A Memorandum on Lifelong Learning", 2000:3). The amended definition is now " all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competencies within a personal, civic, social and/or employment related perspective", (*Making a European Area of Lifelong Learning*, 2001: 9).

Following the consultation exercise, the response of the Commission (at a rhetorical level at least), seems to reflect a move away from a purely labour market dimension of lifelong learning and places an increased emphasis on the needs of the individual. The Commission also reaffirms a commitment to partnership and further consultation with the social partners, *(Making a European Area of Lifelong Learning*, 2001: 28). However, the basic thrust of the Memorandum and the response documents is inescapably centred around lifelong learning as a mechanism for increased international economic competitiveness. This reflects the view of Demeulemeester and Rochat (2001) that EU policy on education and training is formally and intimately linked to the economic success of the EU. It might also be added that since the 2000 Feira European Council, lifelong learning is seen in the same light. Education training and lifelong learning have become key economic issues[2].

Demeulemeester and Rochat (2001) make several observations on "official" EU policy on systems for education, training and also the impact of the Memorandum on lifelong learning. They argue that the policy stance taken by EU experts and strategists is one of clear economic liberalism. That is, any economic benefits gained by the participation of the EU in the global economy are to be acquired without the construction of barriers that are able to protect its citizens from the excesses of international economic forces. Moreover, reforms directed at the enhancement of the competitive position of the EU are focused on an increase in both overall individual responsibility and workplace flexibility. In order to meet rapidly changing economic circumstances, learning systems need to quickly generate the correct number of people possessing the right levels of skills. These commentators further consider that EU policy towards education systems, in advocating closer links to market needs,

[2] The Santa Maria Da Feira European Council of June 2000 obtained agreement from EU states to develop national lifelong learning strategies. Such strategies would develop citizenship, social cohesion and employment.

injects short-termism and commercial requirements into a "world which was initially devised to prepare for the long run adaptiveness of society and individuals, not solely from an economic point of view but also social, moral and political" (Demeulemeester and Rochat: 16). This analysis finds resonance with the views expressed by Coffield, that what is behind such policies is not merely an educational nostrum but "a simplified version of the theory of human capital" (1999: 4-10). The problems of *human capital theory* are have been much discussed. As Coffield notes, theoretically it is "seriously incomplete", empirically it is open to dispute, it has created an inappropriate moral economy, it ignores the sexual division of labour, it ignores economic polarisation and it diverts attention away from a real understanding of the relationship between education and the economy (Berg, 1973; Castells, 1998; Levin and Kelly, 1997; Blackmore, 1997; Baron *et al*, 1998; Karabel and Halsey, 1997).

A slightly more positive prognosis for the future development of lifelong learning - as represented by the Memorandum - is presented by Fryer (1999). Commenting on the Memorandum, he argues, "the objectives are laudable". However, they are unlikely to be achieved, he argues, if non-participants in the process of lifelong learning are not encouraged to participate, or educationalists become marginalized.

Final Considerations

Ideological and normative values underpin the many theoretical and practical aspects of attempts to create a learning society and enshrine the principles of lifelong learning for the citizens of the EU. However the economic, political, policy and philosophical dimensions of lifelong learning are conceptualised, debates will no doubt continue apace. In this context, Demeulemeester and Rochat (2001:15-16) question the neutrality of key EU policy makers active in the field of education and training. Such policy makers are, they argue, wedded to economic liberalism and individualism. Furthermore, it is argued that social welfare is directly equated to material welfare and social welfare is developed through the progress of free trade and laissez faire society. This philosophical outlook introduces commercialism into a realm - that of education - which should not only possess economic, but also clear social, moral and political dimensions.

Bagnall (2000) categorises lifelong learning as being in the service of the global economy. He suggests that the discourse of lifelong learning is "substantially the product of economic determinism" and the preoccupation with the acquisition of occupationally based skills is an "evil" that marginalizes a greater body of culture and education than it enhances. The provision of state education is diminished to the role of basic skills learning and educational privileges are filtered to the already wealthy at the expense of the poor. In a similar vein, Stock (1993) longs for a return to the "romantic" period of adult education in the UK, whereby the aim was to make learning a central part of social change. This "life enhancing" education Stock contrasts with the formal, instrumental, invariably work related, adult education of contemporary society.

Jacques Delors perhaps envisions a future for lifelong learning akin to that of Stock.

> There is a need to rethink and broaden the notion of lifelong education. Not only must it adapt to changes in the nature of work but it must also constitute a continuous process of forming whole human beings - their knowledge and aptitudes as well as the critical faculty and ability to act. It should enable people to develop awareness of themselves and their environment and encourage them to play their social role at work and in the community (Learning: The Treasure Within, 1996).

In an increasingly competitive global economy, the discourse on lifelong learning is ultimately contextualised by the political and economic requirements of the European economies and the gathering momentum of the EU. Carnoy and Levin (1985) postulate that the relationship between education and work is dialectical in nature and consists of a perpetual tension between two dynamics, the imperatives of capital and those of democracy in all its forms. In the same vein, Keep (2001), contends that skill and by implication learning, is a socially constructed phenomenon. If the social and economic context and nature of lifelong learning developed by these writers is accepted, it perhaps follows that any analytical approach to the study of lifelong learning needs to recognise both the dynamic nature of capitalist competition and the importance of social action and institutions at the level of the workplace (Heyes and Stuart, 1994).

The EC is clear in its view that the development of lifelong learning should occur through processes of social partnership. This is manifest in the Green Paper.

Partnership for a new Organisation of Work (1997) and the European Employment Strategy. Coffield (1998) contends that a new form of society built on the basis of lifelong learning is the responsibility of all the social partners and "should deliver social cohesion, social justice and economic prosperity to all its citizens rather than wealth to a minority" (ibid: 52). He however judges that partnership is often a euphemism for attempts by the state to transfer the funding of education and training to business. In a discussion around the notion of "lifetime employability", Waterman *et al* (1996), suggest that if partnerships are to be formed they must be based upon mutual trust and caring. If then, at both the levels of concept and practice, partnership is to be a central component of the process of lifelong learning, how is it to be understood? The next section of the review attempts to profile partnership within the European arena.

Chapter 3

Partnership: A Process for Change?

For the purposes of this review, the phenomenon of partnership will be conceived as a broad conceptual entity. This is necessary in order to take into account the lack of definitional clarity with regard to the nature of partnership (Martinez Lucio and Stuart, *forthcoming*). This is particularly the case within the Anglo-American literature, much of which is set at the level of the firm (Roche 2000). In addition, differing styles of Western trade unionism and varieties of European legal systems inevitably impact upon analysis (Teague, 2001; Edwards, 1986; Roche, 2000; Waddington, 2000). Besides its significance at the level of employment, partnership is inextricably bound up within the process of "social Europe" and social dialogue. This dual level of action is reflected in the literature and helps to guide our review. The term partnership will, therefore, encompass the role of the social partners engaged in dialogue at workplace, national and supra-national levels. Developments at the workplace will thus be linked to the politics and institutions of the European Union (EU).

At a pan-European level, the recent origins of social dialogue and partnership can be traced back to the establishment of the Economic and Social Committee under the aegis of the 1957 Treaty of Rome. The process has been enhanced by the Social Charter of the 1992 Maastricht Treaty, which as the Social Chapter was fully incorporated into the corpus of European legislation by the 1997 Treaty of Amsterdam. The establishment of both the Economic and Social Committee and the Social Chapter have been categorised as attempts to redress the essentially economic and liberalising nature of the project of European integration (Nugent, 1999). For Hyman (2001), from the Treaty of Rome through the Single European Act to the Maastricht Treaty and monetary union, the project of European integration has had as its central rationale the unification of the economies of Western Europe as a bulwark against American and now global capital.

At the institutional level of European policy determination, Gilman and Weber (1999) detect a trend of "increasing importance" for the role of the partners and social dialogue. Indeed, they further suggest that the process of social dialogue is now the main focus for the establishment of social policy within the EU. Jenson *et al* (1999), in their work on the development of a putative European system of industrial relations, take this observation a step further. They suggest that in the realm of the labour market, the social dimension of the EU now acts as a key regulator for pan-European policy. They further propose that both the development of social dialogue and the political and institutional dynamics of the EU are now acting in a concerted manner that suggests the genesis of a European system of industrial relations. This model is based upon a number of elements and is evidenced by examples such as the Social Charter and employment related European Directives that in their view act to bind together key actors at both the national and European levels. Similarly, the increasing impact of European Works Councils and the expansion of Pan-European negotiations between the European Trade Union Confederation (ETUC), and the Union des Industries de la Communaute Europeenne (UNICE), are also seen as indicative of such developments. Waddington (2000) concurs. He suggests that, particularly through the role of the ETUC, a form of trade union activity is developing that is moving beyond the constraints of the nation state. Writing in 1992, Streeck and Schmitter (1992) doubted that such developments would be likely to occur. However European Works Councils now occupy an important position in discussions of social partnership. Weston and Martinez-Lucio (1997) have pointed to their growing importance as potential sources of both formal and informal networking between trade unions in different European countries.

Although the significance of EWCs to the landscape of European industrial relations is not doubted, they by no means constitute a homogeneous entity. Marginson (2000) has pointed to the different approach that Anglo-American and Anglo-Irish take to consultation and the provision of information to Council representatives compared to continental companies. He also describes the variety of works council structures and levels of formal trade union participation that exist within the European setting. Similarly, distinctions are made between Germanic-

Dutch, Franco-Belgian and southern European, Nordic and Anglo-Saxon forms of employee representation.

(Jenson et al 1999) suggest that the Social Protocol provides a central dynamic for the process of social partnership The Social Policy Protocol of the Maastricht Treaty became the Social Chapter of the Treaty of Amsterdam which, as Marginson (2000) notes, formalised much of the content of the Social Charter. The Chapter applies to all member states and provides for the social partners to directly negotiate transnational agreements. The 1995 agreement on Parental Leave was the first such agreement generated by this process. A number of commentators have, however, challenged the assumption that social partnership is being made more relevant through the Europeanisation of national systems of industrial relations (Hyman, 2001; Roche, 2000). Hyman (2001), for example, supports the prognosis that a rapidly developing network of institutional arrangements is increasingly providing platforms on which social dialogue can occur, yet he argues that a "denationalisation" of national level industrial relations is in reality also unfolding. The national characteristics of systems of industrial relations, embedded as they are within the regulatory capacity of the nation state are being undermined by the pressures of international competition, cross-national economic integration, the policy constraints of governments and the actions of MNCs. Such denationalisation does not however point in the direction of a European system of industrial relations that could act to buttress partnership throughout the EU. The corrosive effects of international market dynamics are actually undermining the ability of national systems of industrial relations to exercise coherent internal regulation. Thus, for Hyman (ibid), the effect of such pressures is one of antagonism towards processes of social dialogue and partnership. Hyman further suggests that social dialogue at a supra- national level is in reality an almost hollow "complex ritual" that cannot replicate national level collective bargaining. Nonetheless, the ETUC has resolved (at its 1999 Congress) to pursue the goal of sectoral or cross-sectoral bargaining at a supra-European level (Waddington, 2000). The reluctance of employers to engage in such negotiations and a lack of a clear European trade union identity represent, however, substantial barriers to such progress (Tarrow, 1995). Similarly, at the political and institutional level, Teague (2001) contends that the EU is incapable of reproducing national social systems, the corollary of which is that any possibility of the development of a social Europe as a substitute for national systems is for him fatuous.

In a similar vein, Roche (2000) argues that developments in the global economy have not led to the creation of a homogeneous new system of industrial relations in Europe. Roche proposes instead, that within Europe there exists a series of co-existing industrial relations regimes, contingent upon local factors. The prospects, therefore, for EU policy on organisation of work as envisaged by the EC (1997) and based upon social partnership within a homogenised, upwardly harmonised European style of industrial relations are perhaps distant (Roche, 2000; Streeck, 1992, 1994, 1995). Yet, for Carter and Scott, 1998), the increased frequency of both political and social interaction will induce a destabilising effect upon processes based at a purely national level. The outcome of this development will be to strengthen a sense of European identity. Likewise, Marginson (2000, 12) notes the presence of a "distinctive European economic space" within the global economy, within which a European dimension to industrial relations is emerging. Gilman and Weber (1994) would concur with this view.

Social Partnership the European Employment Strategy and Monetary Union

The European Employment Strategy (EES) emanates from the Amsterdam Treaty of 1997, its mechanics and potential influence indicates a central role for social partnership. This is an explicit requirement within the EES pillars of "employability" with its emphasis on lifelong learning, and "adaptability" with its focus on functional flexibility (Barnard and Deakin, 1999). The EC Decision of January 19, 2001 on "*Guidelines for Member States employment policies for the year 2001*" is clear on the role of partnership in the implementation of the Employment Strategy. The Annex on "*The Employment Guidelines for 2001, 'Horizontal objectives', paragraph C*" states, "Member States shall develop a comprehensive partnership with the social partners for the implementation, monitoring and follow up of the Employment Strategy". A similar message is articulated in the EC Green Paper, "*Partnership for a New Organisation of Work*" (1997; Paragraph 40). The Employment Committee established by the Amsterdam Treaty has an advisory role in monitoring levels of employment within the member states of the EU and is required to consult with the social partners. For Barnard and Deakin (1999), this development is considered to be an important step in solidifying the processes of social dialogue and social partnership. They suggest that at a macroeconomic level the economic guidelines

emanating from the Maastricht Treaty point the way towards a neo-corporatist role for the social partners in tripartite, national level dialogue over the employment consequences of European Monetary Union (EMU), (ibid: 363-4).

Barnard and Deakin submit that the third stage of monetary union will curtail the possibility of intra-national labour market flexibility. Also, following the removal of national autonomy in the formation of economic policy development, European level social dialogue could constitute a vehicle through which to head off any social discord that might develop as a result of a lack of room to manoeuvre within the national bargaining arena. Developing the theme further, Kuhlmann (2000) and Sisson *et al* (1999) have identified the EMU as representing both an opportunity and threat to trade union attempts to further development the European social model. For Pierson *et al* (1999), the prospects of success for the EES process are limited by the actuality that none of the key political actors involved in its conception actually believed in the process as a whole. The British, for example, gave importance to increased market dynamism, whilst the Dutch emphasised macroeconomic stability. For the German and French governments it was the creation of a European level playing field that was of central importance. Against this backdrop, it is suggested that the EES works well as a policy agenda, but does not "provide a sense of broader coherence" (Pierson *et al*, 1999: 284).

Gilman and Weber (1999) offer a more positive perspective on developments in this area. They point to the report of the High Level Group on economic and social implications of change - "*Managing Change*" (1998) - as being indicative of the importance of the role now ascribed to the social partners. Yet, as Gilman and Weber note, even though at a European level the social partners are increasingly involved in policy formation, it is employers who invariably determine the bargaining agenda with flexibility and adaptability high on the list for debate.

Finally, Goetschy (1999) and Gilman and Weber (1999) draw attention to the pragmatics of European policy-making and the key concern of policy makers that the agenda of EMU should not be derailed. Evidence for this is provided by the decision of the European Council (EC) to issue the Directive on employees' information and consultation rights in 1998. This became necessary following the refusal of UNICE to accept legislation through joint action by the social partners. The impending crisis caused by the lack of consultation with the workforce prior to the announcement to close the Reanault plant in Vilvoorde was seen by many as containing the potential

for an adverse reaction to the whole process of European integration. This development was considered to be politically unacceptable and a draft Directive on consultation rights was forced through. At a more fundamental level, Stirling (1991) considers that the Social Charter reflects political compromise rather than an historic move in the direction of workers rights.

Nugent (1999) has added to the debate on the effectiveness of the EES and the ability of social partnership to deliver on employment. For him, the preoccupation of national governments with international economic competition effectively rules out the implementation of meaningful policy measures for the protection of employees and inhibition of excessive labour market flexibility. Goetschy (1999) also notes the primacy of economic over social policy. This is clearly apparent in the way that lifelong learning, for example, is conceptualised at the policy level in essentially economic rather than social or cultural terms. In response, Teague (2001) argues that EU states have eschewed American type deregulation and that amongst large sections of the EU administration and political elites there is a "genuine and continued" commitment towards a "third way" of European capitalism. Pierson *et al* (1998) also conceptualises the amalgam of the social and economic aims of the EU as constituting a positive development for social Europe and one that might be categorised as a European style political "third way".

However much EU policy statements are dissected or developments within social dialogue are nuanced, the March 2002 Barcelona European Union Summit meeting on economic reform perhaps provides a lens through which to observe the political reality of the EU and the potential direction of travel for economic policy. The coalition of Tony Blair, Jose Maria Aznar and Silvio Berlusconi around the issues of workers rights and labour market flexibility presents a challenge to those who see "social" Europe and the EES as sentinels of labour standards. These political leaders are united in their belief that more not less flexibility is needed in the labour market. There is also agreement that the EU should not provide increased worker rights. (The Observer, March 17 2002:31; The Times, March 16 2002:4) This pro-business stance has been advocated as necessary by both Tony Blair and the UK chancellor Gordon Brown. For Blair "...the best way to produce more jobs is to help business, help enterprise and then give people the education and the skills they need to compete in modern markets", (Financial Times, March 16/17 2002:2). Similarly, according to Gordon Brown, "We are not going to be diverted ... from our pro-competition, pro-

enterprise agenda..." (ibid:2). Criticisms of these policy announcements by John Monks, the leader of the UK Trade Union Congress were dismissed as merely dated rhetoric. If, as some would argue, contemporary developments in politics and economics are providing a beacon towards a pan-European political "third way", the impact on the needs of social Europe of such political support for an overt pro business agenda must be a concern.

Partnership at the workplace

For Cutcher-Gershenfeld and Verma (1994:547), global economic pressures are changing industrial relations and human resource management practices on a worldwide basis. In response to such forces for change, the introduction of flexible working practices and new methods of work organisation appear to be driving the development of partnership at the level of the organisation. As Brown (1994) argues, this trajectory has clear implications for economic and power relationships between the requirements of management and organised labour. If partnership agreements facilitate wage reductions and through increased flexibility contractual rights to a specific job are weakened, the ability of trade unions to bargaining collectively will in a real sense become endangered. The consequences for trade unions could well be profound in that union members might well start to question the logic or necessity for being a member of a trade union. Thus, Barnard and Deakin (1999: 364) suggest that the role of partnership at the workplace is "one of assisting the modernisation of working arrangements". The EU Green Paper on *Partnership for a New Organisation of Work* (1997) lends support to such claims. The Green Paper describes the demise of Fordist methods of mass production and develops the argument that what is now a precursor for competitive success is the flexible firm and a new organisation of work. New organisational forms require a more efficient use of technology in order to improve both productivity and quality. The social partners are exhorted to work together in order to achieve these aims. The EC document of 1998, "*Modernising the Organisation of Work – a positive approach to Change*", attempts to develop the same theme. Similarly the Economic Guidelines of the EC portray labour market flexibility as central to (high levels of) employment. In addition, the EES calls for the social partners to modernise the organisation of work, "balance flexibility with security" and develop training and lifelong learning through partnership. Interestingly,

as Undy (1999) notes, the notion of social partnership as exemplified by the "third way" of the UK Labour government, is, as in the Green Paper (1997), based upon the concept of modernisation of work (1997).

Guest and Peccei (2001) offer a categorisation of partnerships based upon three perspectives. A pluralist perspective has its roots in the European concept of employee representation and industrial democracy and worker participation within an overriding pluralist tradition. A key element of this outlook is that co-determination institutionalises and diffuses differences of interests between capital and labour. Guest and Peccei point to the Social Chapter and the Directive on European Works Councils as representing the clearest manifestation of this approach. Employee voice through a clear system of representation is a defining feature of the pluralist approach. By contrast, a unitarist perspective towards partnership focuses on the integration of employee and employer involvement, particularly the involvement of individuals in job related issues and commitment to the company. A variation on this theme is the development of a psychological stake in the company through "high involvement " human resource practices. The third perspective is described as being a hybridised approach. This incorporates elements of both the pluralist and unitarist perspectives. The hybrid perspective is based upon pluralism and representative systems, but demands employee involvement and participation and an ethos based upon "working together". The hybrid perspective clearly resonates with the "mutual gains model" of Kochan and Osterman (1994), which is arguably the predominant contextualisation for notions of partnership in the UK.

How then have the problems and prospects for social partnership at the level of the organisation been classified? The literature has focused on a number of themes, including workplace flexibility, 'new' working practices, employment security, mutuality, involvement, voice mechanisms, collective bargaining and the role of trade unions (see Martinez Lucio and Stuart, *forthcoming* and Stuart and Martinez Lucio, 2002 for reviews of the key themes in the debate). The literature also points to the increasingly important role that MNCs are playing in the reorganisation and Anglo-Americanisation of work and their potential effect on the European model of social partnership (Edwards, 2000; Waddington, 2000; Marginson, 2000; Ferner and Quantanilla, 1998). The role and activity of MNCs is therefore of growing importance in the discourse around partnership and its possible future trajectory. Debate as to the essential nature of MNCs has occurred in parallel with analysis of national business

systems. MNCs are variously categorised as being essentially national in character (Whitley, 1992), stateless (Ohmae, 1990), or organised along sub global lines and simultaneously possessing features that are discernibly both national and international in character (Marginson, 2000). Edwards (2000) maintains that MNCs provide a prominent mechanism for cross border diffusion of knowledge and working practices. It is argued that MNCs act as vectors for change and lead to the coalescence of management systems, corporate governance and notions of best practice (Marginson *et al*, 1995; Marginson, 2000). Ferner and Quantanilla (1998) develop this argument further. They propose that pressure on European MNC's to internationalise and on a world stage to catch up with their Anglo-American counterparts has intensified. Such companies have developed authority structures, control and management systems and financial accounting procedures that increasingly reflect the Anglo-American model. Developments in this area, will, it is suggested, produce tensions between home country and imported business systems that will necessarily impact on systems of industrial relations and partnership arrangements. Coller and Marginson (1998) have described that through the processes of cross-site and cross border diffusion, the powerful impact that such developments have on employment practices. As an evolution of this process, Marginson (2000) describes the phenomenon of "reverse diffusion". This occurs when corporate management identifies desirable practices in international subsidiaries. Such practices then become absorbed into domestic (home) plants.

Ferner and Quantanilla (1998) in their work on Anglo-Saxonisation (Anglo-Americanisation) present the German model of business as being emblematic of a mainland European approach to commerce. Indicative of this business system is an outlook based upon a co-operative style of management, the need for partnership with employees, a long-term approach to profitability and a level of social responsibility towards employees. In terms of corporate governance, the *insider* system of continental Europe based on long term bank credit and underdeveloped stock markets, has been contrasted to the Anglo-Saxon *outsider* system with its dependence on shareholder value, internal sources of finance and short-termism, (Marginson and Sisson 1994). Ferner and Quantanilla (ibid) contend that although a process of Anglo-Americanisation is occurring throughout Europe, its manifestation is not uniform in character but rather nationally specific as MNCs continue to be embedded in their own national business systems. This analysis in large measure fits with that of

Marginson (2000). That MNCs are a force for change is attested to by the experience of German MNCs within Germany itself where through strategies designed to better compete in rapidly changing international markets, such companies are attempting to break free from traditional German corporate business structures. These companies are also issuing a direct challenge to the basic features of the German system of industrial relations with a particular drive towards an increase in workplace flexibility (Ferner and Quantanilla, 1998; Edwards, 2000). Muller (1998) also describes the activities of American MNCs in Germany. Many such organisations have contrived to remain outside the system of multi-employer bargaining, co-determination and vocational training by the use of appropriate systems of recruitment, elevated levels of pay and the dismissal of union leaders.

If the Anglo-American model of business and industrial relations is indeed diffusing to mainland Europe, its characteristics and impact will be of increasing interest to all those involved in the European arena of employment relations. In the UK, much research has taken place on attempts to identify specific features of partnership firms (Bacon and Storey 2000; Guest and Peccei 2001; Martinez Lucio and Stuart, 2002). As Guest and Peccei (2001) note, such features are a mixture of normative, descriptive and instrumental components. Again in the UK, the Involvement and Participation Association (IPA 1997) and the Trades Union Congress (TUC) in its "Partners for Progress" document (1999) have both developed principles of partnership that are seen as being essential to the successful development of workplace partnership. These include commitment to business success, employment security, employee voice, training and development, transparency, direct participation. Kochan and Osterman (1994) contend that for mutual gains and hence partnership at work to have a chance of being successful effective employee voice mechanisms and a strategic link between the process of partnership and changes in conditions of work is crucial.

Within the UK literature there exist divisions of opinion as to the ability of partnership to provide realistic benefits to employees or their trade unions. It is worthy of comment that, at an UK or European level, notions of partnership do not necessarily assume a role for trade unions. Guest and Peccei (2001) whilst accepting the problematic nature of trust and mutuality suggest that partnership can lead to benefits to all participants. Ackers and Payne (1998) adopt a more cautious approach, but nevertheless argue that unions can use partnership in order to (re)establish a role

in the workplace and society at large. However, commentators such as Kelly (1996, 1998) and Taylor and Ramsey (1998) are highly sceptical about the ability of partnership, as evolving in the UK workplace, to deliver meaningful and lasting gains for employees. Partnership, it is suggested, can act to undermine trade unions and effective collective bargaining.

It has been proposed that the role of unions within partnership can be important in the development of high performance work practices within the context of enabling human resource policies (Kochan and Osterman, 1994; Couper and Stevens, 1998). Galang's (1999) analysis of a sample of 222 business organisations in the United States suggests, however, that trade unions and HRM departments have competing interests in a high performance work systems. High performance work systems include practices such as formal training and employee participation programmes, career planning, formal performance appraisal and incentive programmes. The conflict of interest manifests itself in a negative correlation between the high performance work systems and trade union activity.

Summary

Developments in the global economy are impacting on employment relationships and partnership arrangements in a seemingly inexorable fashion. Moves towards the decentralisation of bargaining, the contraction of multi-employer bargaining, the growth of non-standard employment, a shift towards more flexible forms of work organisation, the role of MNCs and the progression of Anglo-Americanisation, have all been described as forces for change throughout the EU (Gilman, 1999; Traxler, 1998; Hyman, 2001; Ferner and Quantanilla, 1998; Streeck, 1992; Edwards, 2000). Furthermore, political and institutional forces nourish such phenomena, at both national and supra-national levels. It remains to be seen how well the European pluralist model of partnership, as described by Guest and Peccei (2001), with its emphasis on participation and employee voice, is able to withstand such forces for change. For Hyman (2001: 287), the power of international finance capital and Anglo-American shareholder value is providing an irresistible force for change on the European social model. "Rhineland capitalism" along with employment relationships based on co-determination and partnership are, for Hyman (2001) in an increasingly precarious state. Barriers that have acted to protect labour relations and labour policy

from adverse changes in economic performance are being progressively dismantled. Indeed, Hyman (2001) goes on to suggest that the concept of European social dialogue as currently understood, needs to be replaced by a process of "internal" social dialogue in order that a common perspective for European labour can be developed. Such an internal process would involve engagement between European trade unions, individuals and groups of citizens committed to the development of a perspective and coalition of opposition towards the "dehumanising" advance of market forces. Such a suggestion finds resonance in the view that the forces of internationalism require trade unions to involve themselves in social movements beyond the traditional boundaries of trade unionism (Waddington 200). Goetschy (1999) further argues that the EU and the EES are vehicles for the creation of a disposable workforce based upon flexible labour markets. Moreover, this process will ultimately lead to a "normalisation" of precarious forms of work. If this analysis is correct, the role of social partnership, however conceived, will inevitably be called into question.

Chapter 4

Restructuring, partnership and learning: an attempt at synthesis

This, the final section of the review will assume the form of a discussion of the connections between the processes of industrial restructuring, strategies for employability, lifelong learning and practices of social partnership. It will draw attention to the role that trade unions can play in processes of learning and employability and will highlight areas where further research might be fruitful.

Restructuring and Human Resource Management

Recent theories of economic growth, 'new' production concepts and 'best practice' human resource management (HRM) techniques all accord skill formation a privileged explanatory position (Keep, 1989; Romer, 1990; Womack, 1994). The basic argument is well rehearsed. Condensed product lifecycles, swiftly changing technology and an increasing internationalistion of trade have generated tremendous pressures for restructuring and change. Yet, survival in the modern market place also requires significant changes in methods of production, the organisation of work and associated employment practices (Hall et al 2000). For many commentators, the requirement for skills upgrading flows fairly logically from the change management process, as human capital becomes identified as the key determinant of economic success. As Storey (1995:8) notes, the development of HRM strategies become linked to the management of change as organisations seek the 'self-evidently prized objectives' of consensus, flexibility and commitment. Consensus is portrayed in terms of a shared set of beliefs and assumptions, flexibility affords productivity improvements through the removal of restrictions and demarcations on labour mobility, and commitment is important in eliciting employees to work 'beyond contract'. Training and development are regarded as the 'vital components' in this process of cultural change (Keep, 1989). Indeed, for Keep (1989:111) companies who treat their human resources as basic commodities rather than resources to be invested in 'cannot meaningfully be said to be practicing human resource management'. The economic imperatives underpinning this assertion are, for Keep, relatively straightforward. Firstly, in order to capture the benefits of any training investment, it

makes sense for companies to introduce other HRM policies that will retain, motivate and ensure the maximum use of any new skills acquired by employees. Career paths, for example, may be fostered through the creation of developed internal labour markets. Secondly, training plays an important behavioral role signaling to employees that the company values their contributions. Keep supports his position with reference to a number of 'best practice' organisations, all of which claimed to be adopting a strategic and structured approach to training. Beyond this, however, the management of skill formation is not explored in any detail. Supporting evidence can be found, however, from recent statistical studies examining the impact of 'bundles' of HRM practices on performance outcomes. This research has consistently associated skill formation criteria, such as multi-skilling, internal recruitment and appraisals with increased levels of job creation, reduced labour turnover and higher profitability (see Cully *et al*, 1999; Huselid, 1995; Ichniowski et al, 1996). These statistical correlations are informative yet they do not in and of themselves explain how the 'bundles' combine and cohere or why companies choose to follow different trajectories of HRM – an important consideration given evidence that the actual diffusion of these high performance 'bundles' is limited (Ichniowski et al, 1996).

The contemporary significance of skill formation of course resonates, wider than the putative HRM strategies and practices of employers. For more important than the quantity of training is the form it takes and the implications this has for the responsibilities and obligations of capital and labour. In order to be flexible, creative and team players, workers are now expected to acquire more analytical, problem solving and cognitive type skills rather than just basic technical skills. Careers are thus to be forged on the basis of competence rather seniority, as the 'new psychological contract' emphasizes the need for workers to retain their employability against declining levels of job security. This learning agenda presents a demanding and complex set of challenges for both employees and employers, requiring a response based on 'reciprocal investment'. Employers still have a responsibility to provide opportunities for training and learning, but increasingly individuals are expected to manage their own careers (both at and beyond the workplace). As Cooper (1997:4) explains:

> The concept of employability implies a radical departure from the traditional relationship between the employer and the employee. The old way was a

> paternalistic structure where the employer looked after the welfare of the workers for as long as they did what they were told. Now that the idea of job security in one organization has had to go, individuals need to manage their own careers. They need to develop skills and experiences that will be employable in the event of change.

Employability and Partnership

The basic thrust of this position has come to dominate much of the policy discourse on employability and lifelong learning. This is certainly evident in the policy discourse of the European Commission, and in particular the European Employment Strategy. Thus, as the 1998 report, '*Managing Change*', published by the European Commission DG for Employment, Industrial Relations and Social Affairs notes, 'Member States should develop preventative and employability orientated strategies, building on the early identification of individual needs and increasing the possibilities for training, work experience, traineeship and lifelong learning'. Much rests here on the assumed mutual benefits thought to accrue from human capital investment. At the level of the individual, improved access and opportunities to learning feed through into enhanced employability and a sense of personal identity. At the level of industry, training and skills upgrading contribute to the management of change, the imperatives of global competition, and ultimately productiveness. At a societal level, strategies for employability help to combat the uncertainties and geographical deprivations of structural change, and help promote social inclusion.

As Heyes (2000: 151) observes, the underpinning assumption of 'mutuality' has 'influenced which aspects of the training debate have been treated as problematical'. Within the academic literature, most attention has focused on comparative analysis of the factors that influence relative indicators of skill formation (see, for example, Lynch, 1994). Underpinned by a belief that 'more is better' (Heyes, 2000), technocratic prescriptions are then forwarded as a remedy for those economies that have become trapped in a low skills equilibrium (Finegold and Soskice, 1988; Finegold, 1991). At a policy level, most attention is typically given to 'supply side' initiatives geared towards the creation of training markets, competence frameworks and enhanced choice for individual 'consumers' of training and learning. Yet, a number of weaknesses are evident in these approaches to skill formation. Firstly, the base position that a ready and extensive supply of skills, competencies and industry

based training packages will match employer demand (for employment and training investment) is highly questionable. it assumes that 'employers have a common understanding of their needs with respect to education and training and are able to articulate them clearly' (Rainbird, 2000: 3). Secondly, and relatedly, the emphasis on matching supply and demand and the over-emphasis on the institutional architecture of training systems has led to an under-developed understanding of the social processes of skill formation at the workplace and industry levels and the relationships between firms' industrial and competitive contexts and their training investment decisions (Heyes and Stuart, 1994). Thirdly, the conflation of employer and employee interests with regard to skill formation is deeply problematic, downplaying the contested terrain that often exists between the developmental needs of the individual and the organisation (Antonacopolou, 2000). Such findings highlight the importance of examining employees' experiences of skill formation and restructuring at (and beyond) the workplace, yet this remains an under-researched area of inquiry.

This lacuna becomes even more acute when considering issues of employability and lifelong learning more broadly. Yet despite the centrality of employability to European dialogue and strategy on employment, education and training, the concept itself has yet to be subjected to detailed empirical scrutiny and remains under theorized. Little evidence exists on the way strategies for employability lead to beneficial outcomes for individuals, companies and communities. It is also apparent that whilst the discourse of employability stresses the importance of individuals managing, and companies providing the enabling conditions for individuals to build, their own careers, the 'voices of the learners themselves' tend to be neglected (Edwards et al 1998: 9). How, for example, do individuals find out about learning opportunities and 'make informed, and negotiated choices about which learning option to follow?' (ibid, 34). What factors are most likely to engage 'reluctant' learners and motivate individual learning strategies? Clearly it is important to identify barriers to learning here. That the dismantling of such barriers is seen as being of fundamental importance (van der Zee 1991; Keep 2001; Memorandum on Lifelong Learning: 2000) is axiomatic. *Learning for the Twenty-First Century* (1997), for example, catalogues the most significant barriers as lack of time, location, accessibility, funding, jargon, bad experiences of earlier education, conflict between providers and under-representation of minority groups. It is also far from clear, what employability actually means for those individuals enmeshed in, and displaced by,

processes of restructuring. To be highly skilled in a declining sector of the economy is no guarantee of employability. Thus, as Coffield (1998: 51) notes, "the paradox of modern industry is that a strong manufacturing base is an essential condition for long-term economic growth but it does not create many jobs". What is required is connected industrial policy. Education and training cannot be solely responsible for unemployment and of themselves cannot generate economic success. As investment decisions pertaining to learning focus increasingly on the individual, guidance structures become more important, and so do 'voice' mechanisms. Trade unions have an obvious role to play here and, indeed, training and learning issues have become more central to the industrial relations agenda in recent years, and have become influential in shaping the development of 'new' trade union strategies (Stuart, 2001). This is typically conceptualized in terms of the need for trade unions to innovate their bargaining interests away from the traditional adversarial agenda (restricted to pay and conditions) to a more consensual agenda based around 'occupational interests' (see, for example, Leisink (1993) and Mathews (1993)). Such innovation is considered essential if unions are to attract new members and ensure that management does not solely determine the direction of industrial change. This line of analysis clearly underpins recent discussions on partnership-based responses to industrial change. Such responses have been championed in recent years by the European Commission and specific national governments (particularly the British Labour government) as being crucial to the development of long-term strategies and structures for employability and the development of a training and skills centered workplace industrial relations agenda (see, for example, the European Commission Green Paper (1997), Partnership for a New Organisation of Work). For example, as a recent Commission paper notes:

> 'Social dialogue and the process of reaching agreement between the social partners at the European level – particularly in the area of vocational training – should form a major component of this community co-operation. Consultation with and between partners on access to skills has already been advocated in the 1997 Report on Access to Continuing Training. Community activity will provide support to the dialogue between and with the social partners' (EC (1997) 'Towards a Europe of Knowledge' DG XII [mimeo]).

At the workplace level it is often difficult to disentangle training issues from the more traditional adversarial industrial relations agenda (Rainbird, 1990; Heyes, 1996;

Stuart, 1996, 2001). Despite this, debates around partnership, particularly in terms of responding to the challenges of employability and modernisation, have intensified in recent years. Yet, as Edwards *et al* (1998; 54) note, 'The legitimate role of trade unions, as organizations in supporting lifelong learning is an under-developed area of research'. Significantly, the question here is 'how far lifelong learning strategies are subsumed within conflict or partnership models of industrial relations. Important attempts at restructuring the relationship between skills, jobs and pay are therefore at work and the development of lifelong learning within employment needs to be understood in this context' (ibid, 54). Payne (2001) refers to the potential of social actors, at both an individual and collective level, to use the agenda of lifelong learning to reinforce their position in the labour market.

Despite an emerging social dialogue over training and learning issues at the European level, divergent views remain much in evidence. The Commission's 1997 report on 'Access to Continuing Training', for example, noted that the social partners (European Trade Union Confederation (ETUC), Union des Industries de la Communaute Europeenne (UNICE)) disagreed over the extent of progress with regard to training access. More fundamentally, genuine partnership arrangements over training and learning are relatively underdeveloped in most European states. National circumstances and traditions and the exposure of companies to international competition will clearly influence the prevalence of partnership-based approaches in different countries. The success of partnership-based approaches to employability and training will thus be conditioned by national legacies of industrial relations and training and development as much as recent government policies, and by the position of national economies and sectors in the international market place as much as specific organisational restructuring imperatives. The diversity of practice across Europe poses a significant challenge for the development of European wide social dialogue. The viability of the partnership approach, as a general EU strategy, is thus a matter for detailed research.

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In a world increasingly characterised by economic uncertainty, learning, or more typically, lifelong learning, is presented as a survival tool for individuals, companies and economies alike. This is increasingly the case at the level of policy, where learning is articulated as a powerful response to industrial restructuring and social exclusion. This agenda of heightened productivity and employability is, it is often argued, most effectively driven through partnership between employers and unions and between educational institutions, industry and the state.

The presumed linkages between patterns of economic restructuring and skill formation are far from transparent. This problem is paralleled by a lack of conceptual clarity around policy formation. The development of a more systematic understanding of these issues and the linkages between them is the key objective of this review.

The review demonstrates the complex connections between the processes of economic restructuring, lifelong learning and social partnership and the contested terrain within which they operate. The relevance for European policy debates is drawn out. It will be of appeal to those with an interest in all the above fields.

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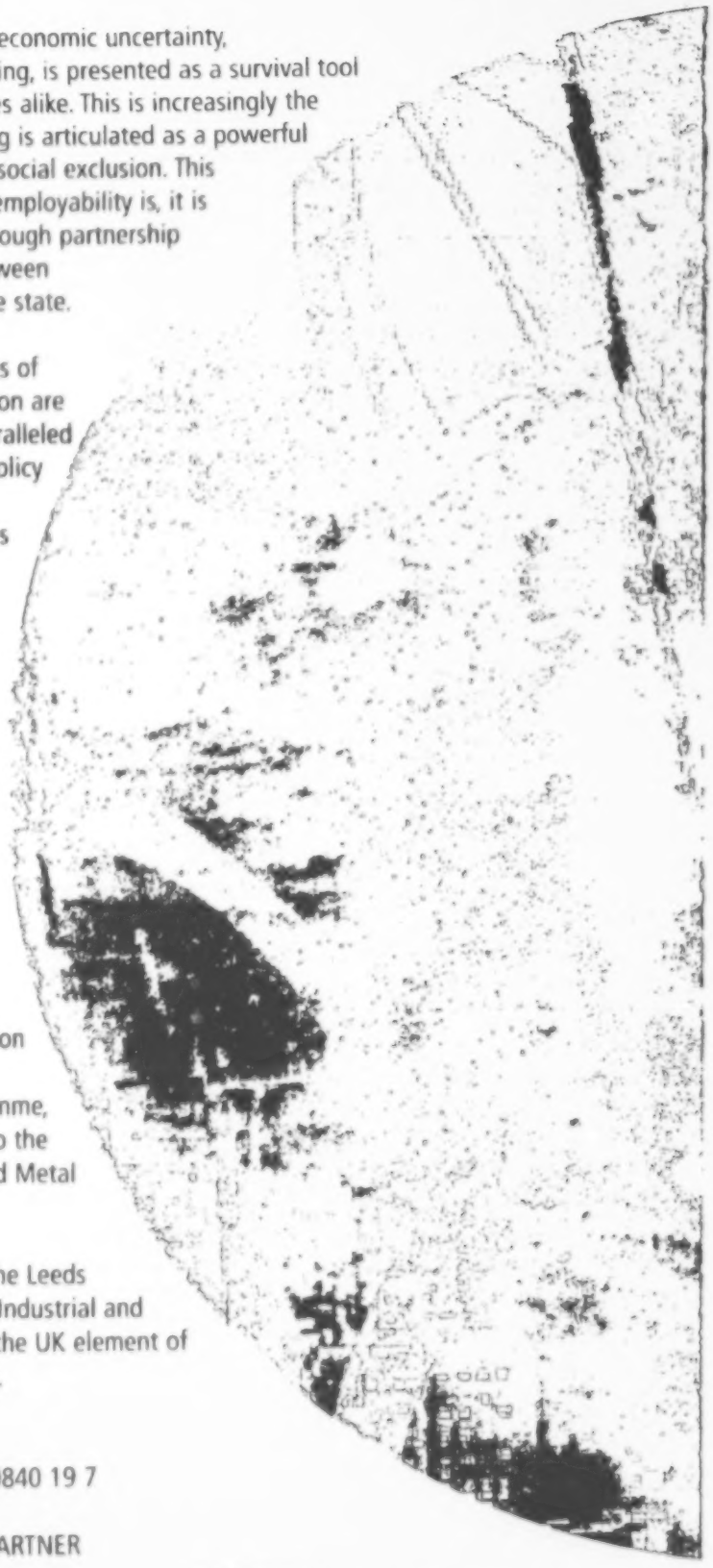

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